



2023
Environmental,
Social and
Governance
Report



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INTRODUCTION

Letter from CEO and Chairman, Bill Stone

About SS&C Technologies

About SS&C's Corporate Environmental,
Social and Governance Report





Letter from CEO and Chairman, Bill Stone

SS&C Technologies has a 37-year history of success serving the most demanding industries in the world – financial and healthcare. With a focus on innovative technological advances and unwavering commitment to clients, we have grown from humble beginnings to a global organization generating over \$5B+ in revenue.

There are certain things SS&C stands for, and will always stand for. We aim to maximize shareholder value and the financial strength of our company. With this foundation, we employ a diverse, talented and driven workforce; invest in the communities we work and live in; and continue to provide the highest level of customer service our clients demand and deserve from us. Our sound governance structure and commitment to our clients and employees, and protecting the integrity of our intellectual property are critical elements. Successfully delivering these elements is essential to future-proofing SS&C.

We recognize the importance of Environmental, Social and Governance (ESG) values and reporting to our key stakeholders. As communicated in our last ESG report, SS&C is prioritizing ESG initiatives. In 2023, we worked with a leading consultant to assist us with enhancing our ESG transparency, reporting and future roadmap. We hope you appreciate the results and find value from this work. We thank all of you for your continued support and interest in SS&C and welcome your feedback.

Sincerely,
BILL STONE



20,000
clients across financial services
and healthcare industries



27,000
employees
around the globe



115
office locations in
35 countries



\$3T+
in Assets Under
Administration

About SS&C Technologies



#1
in alternative fund administration and mutual fund transfer agency

SS&C Technologies Holdings (NASDAQ: SSNC) provides the global financial services and healthcare industries with a broad range of software and software-enabled services, combining end-to-end expertise across financial services operations with software and solutions to support the most complex and demanding customers in the financial services and healthcare industries.

About SS&C's Corporate Environmental, Social and Governance Report

SS&C's Environmental, Social and Governance (ESG) program and report is driven by the needs of our key stakeholders including investors, clients, employees and partners. Our annual report is informed by ESG reporting frameworks such as [Sustainability Accounting Standards Board \(SASB\) standards](#), [Global Reporting Initiative \(GRI\)](#) and [Task Force on Climate-Related Disclosures \(TCFD\)](#). ESG is an essential part of our culture

and commitment to developing strong client relationships, building innovative technology and delivering shareholder and societal value.

In 2023, SS&C engaged a third-party consultant to perform a thorough materiality assessment to drive our ESG strategy and program. We identified potentially material topics based on market research, ESG frameworks and standards (including SASB, GRI, TCFD), ratings agencies, and stakeholder engagement. We assessed ESG priorities across our value chain from investors, employees, clients and partners. SS&C will continue to assess our material topics and ESG program in the future.

Material topics were classified according to their importance to stakeholders and impact on the business. Using a materiality matrix, we categorized certain topics as a high priority, business as usual, topics to watch and mid-level priority. This allows SS&C to implement quickly and at scale while creating future goals for the mid-level priority topics. Our priority topics include **climate risk, employee attraction and retention, diversity, equity and inclusion, learning and development, data privacy and cybersecurity, and ethics and reporting**. These topics will inform our ESG strategy and reporting over the next several years.

This report lays out SS&C's current programs addressing these topics, as well as future plans and initiatives. We are committed to being responsive to customer and regional needs and will be compliant with all local mandates where we do business.

This report has been reviewed and approved by management, as well as the Nominating and Governance Committee Chair of our Board of Directors, which has ESG oversight.

○ ○ ○ Priority Topics



SOUND GOVERNANCE

Board of Directors

Control Environment

Ethics and Reporting

Customer Engagement

Data Privacy and Cybersecurity



Sound governance is critical to the management and stability of our business. SS&C’s executive leadership and Board sets high standards for SS&C’s employees, officers and directors through its governance and by establishing and enforcing policies designed to promote and ensure integrity and ethics throughout the organization. Implicit in our philosophy is the importance of sound corporate governance. Key components of our program are outlined, as follows.

Board of Directors

SS&C is governed by our Board of Directors (“Board”) which oversees the overall business affairs of the company. The Board is responsible for providing advice and oversight of the strategic and operational direction of the company to support the long-term interests of the company and our stockholders. The Board must serve as a prudent fiduciary for shareholders and oversee the management of SS&C’s business. To fulfill its responsibilities and discharge its duty, the Board follows the procedures and standards outlined in SS&C’s bylaws, charters of its committees, and other guidelines including corporate governance guidelines that address matters such as the roles and responsibilities of the Board, the Board’s leadership structure, the responsibilities of the lead independent director, director independence, overboarding, succession planning and retirement age, Board membership criteria, Board committees, director orientation and continuing education, as well as Board and senior management evaluations.

Six of the seven Board members are “independent” under criteria established by Nasdaq. Our directors possess strong executive experience and skills aligned with SS&C’s global business requirements. The average tenure of our directors is 15 years. In terms of criteria for composition of the Board and Board committees, the Nominating and Governance Committee considers the diversity, age, skills, background and experience of the directors, with the goal of providing a significant breadth of experience, knowledge and abilities to assist the Board in fulfilling its responsibilities. The Board meets periodically as deemed necessary, but at least every fiscal quarter. The Board has established three committees: the Audit Committee, the Compensation Committee and the Nominating and Governance Committee. Each committee operates according to its charter adopted by the Board.

Board Diversity Matrix

July 2023

Total Number of Directors	7	
	Female	Male
Part I: Gender Identity		
Directors	1	6
Part II: Demographic Background		
Asian	1	-
White	-	6



Executive Compensation and Compensation Committee

Our executive compensation program is overseen and administered by our Compensation Committee. It is designed to foster a performance-based culture that aligns executive officers' interests with those of our stockholders. The primary objectives of the Compensation Committee with respect to executive compensation are to attract, retain and motivate the best possible executive talent; reward achievement of our strategic objectives by the executive officers and the Company as a whole; and align the interests of the executive officers with those of our stockholders by emphasizing performance-based compensation.

To achieve these objectives, our executive compensation program employs a variety of elements, the interplay of which results in a compensation program that is strongly aligned with stockholder interests, retains a talented executive team that is critical to executing our business plan and rewards them for creating value for our stockholders over the short- and long-term.

The programs contain elements of cash and equity-based compensation and are designed to align the interests of our executives with those of our stockholders by, among other things, (i) employing a formulaic approach under which target cash bonus opportunities are established for each executive and are earned and paid based on achievement of pre-established, objective performance metrics, and (ii) employing an approach to long-term equity compensation that emphasizes pay-for-performance by granting annual equity awards of 50% in the form of performance stock units (PSUs), 25% in the form of restricted stock units (RSUs) and 25% in the form of stock options, with PSUs earned upon achievement of pre-established, objective EPS growth performance metrics.

SS&C's Compensation Committee oversees the responsibilities of the Board relating to compensation of the Company's executive officers. The Compensation Committee's responsibilities are set forth in its charter available [here](#).

The Compensation Committee meets periodically as deemed necessary to perform its responsibilities, but at least every fiscal quarter.

Audit Committee

The Audit Committee of the Board assists the Board's oversight of (i) the integrity of the Company's accounting and financial reporting processes; (ii) the Company's compliance with legal and regulatory requirements; (iii) the Company's independent auditor's qualifications and independence; (iv) the performance of the Company's independent auditor; and (v) the performance of the Company's internal audit function. The Audit Committee's responsibilities are outlined in its charter available [here](#).

The Board has determined that each of the members of its Audit Committee is an "audit committee financial expert" as that term is defined under the rules and regulations of the SEC. The Audit Committee meets periodically as deemed necessary to perform its responsibilities, but at least every fiscal quarter.

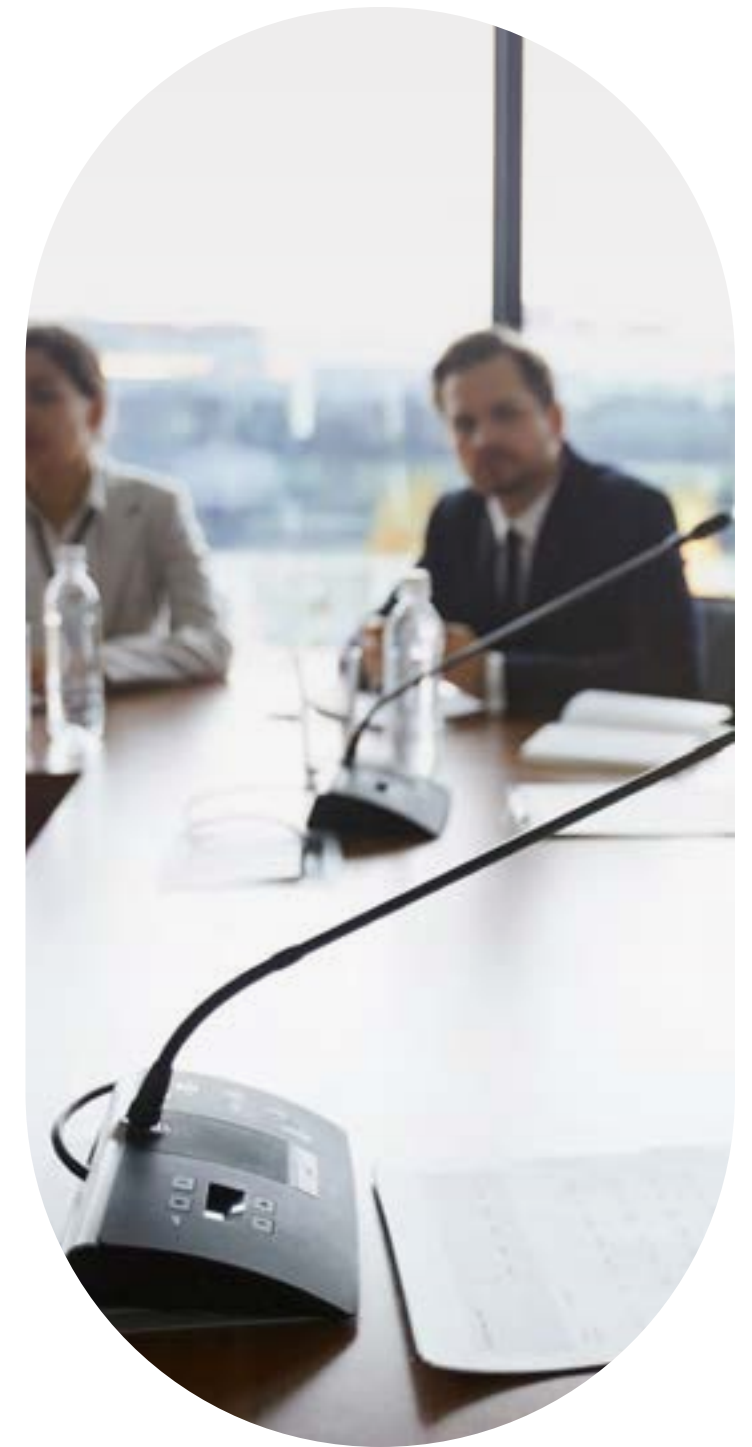
Nominating and Governance Committee

The Nominating and Governance Committee reviews criteria for the selection of candidates to the Board and identifies individuals qualified to become Board members consistent with such criteria; recommends to the Board the persons to be nominated for election as directors at meetings of SS&C's stockholders and the persons (if any) to be elected by the Board to fill any vacancies on the Board; recommends to the Board the directors to be appointed to each committee of the Board and the directors to be appointed as committee Chairs; makes recommendations to the Board as to determinations of director independence; oversees the evaluation of the Board; reviews the adequacy of, and oversees compliance with SS&C's Corporate Governance Guidelines; oversees practices and processes relating to the management and oversight of environmental, social and governance matters ("ESG Matters") in coordination with other committees of the Board; and reviews and makes recommendations with respect to the succession plan for the Board and CEO.

The Nominating and Governance Committee meets as necessary to achieve its responsibilities, but at least every fiscal quarter, and its responsibilities are outlined in its charter available [here](#).

In considering whether to recommend any particular candidate, the Nominating and Governance Committee applies the criteria specified in its charter and in the Corporate Governance Guidelines including the candidate's independence, integrity, honesty, adherence to ethical standards, demonstrated business acumen, financial expertise, experience, ability to exercise sound judgments in matters that relate to the current and long-term objectives of SS&C, ability to contribute positively to the decision-making processes of SS&C, commitment to understanding SS&C and our industry as well as to regularly attending and participating in meetings of the Board and its committees, ability to understand the sometimes conflicting interests of the various constituencies of SS&C and the absence of a conflict of interest. The Nominating and Governance Committee does not assign specific weights to particular criteria, and no particular criterion is a prerequisite for any prospective nominee.

In terms of criteria for composition of the Board, the Nominating and Governance Committee considers the backgrounds and qualifications of the directors as a group with the goal of providing a significant breadth of experience, knowledge and abilities to assist the Board in fulfilling its responsibilities. Although the Nominating and Governance Committee considers the value of diversity on the Board, it has not adopted a written policy with regard to the consideration of diversity when evaluating candidates for director. However, in practice, the Nominating and Governance Committee considers diversity of viewpoint, professional experience, education and skill in assessing candidates for the Board to ensure breadth of experience, knowledge and abilities within the Board. Our Board's priority in the selection of Board members is identification of members who will further the interests of our stockholders through their management experience, knowledge of our business, understanding of the competitive landscape and familiarity with our targeted markets.



Control Environment

Risk Management

SS&C's management is responsible for risk management on a day-to-day basis. SS&C's Audit Committee is responsible for overseeing our risk management function. While the Audit Committee has primary responsibility for managing risk management, our entire Board of Directors is actively involved in overseeing our risk management. Our Board and the Audit Committee fulfill their oversight role by discussing the policies and practices utilized by management in assessing and managing the risks and providing input on those policies and procedures.

SS&C has a comprehensive, multifaceted risk management program designed to identify, assess, mitigate and manage risk. SS&C's risk management program consists of activities at the enterprise level to provide the overarching risk reporting and management framework and risk assessment, monitoring and management for enterprise-wide functions and risk. SS&C business unit risk programs assess, monitor and manage business-level and product risk. Operating together under a single view, these programs provide a multidimensional risk view and multilevel controls to minimize risk exposure to SS&C and our customers.

SS&C conducts an annual Enterprise Risk Assessment (ERA) program across applicable entities. The ERA evaluates risk across internal and external risk drivers. The ERA focuses on SS&C's ability to attain business objectives given strategic, operational (includes technology reliability, information integrity, security, privacy, vendor management and HR), compliance (includes legal and regulatory) and financial drivers. Business units, major divisions within business units, and significant enterprise functions participate in risk identification and assessment. Risk profiles are documented, mitigation actions identified and ownership assigned to address risk areas requiring improvement.

As part of our risk management program, new hire and mandatory annual training is required and includes topics such as anti-money laundering, security, privacy, risk and resilience, code of business conduct, security policy and anti-harassment policy. These courses have a 98% completion rate.



98%

completion rate for anti-money laundering, security, privacy, risk and resilience, code of business conduct, security policy and anti-harassment policy

The Enterprise Risk Management group includes Business Continuity (BC) and disaster recovery testing. This group governs how BC plans are developed, including identifying the impact of any disruption and strategies to resume services provided during an event. Risks can be identified through BC planning (Business Impact Analysis) or through risk assessments and are managed according to procedures outlined in both the risk and global crisis management programs.

Internal Audit

Internal Audit performs ongoing operational, financial, information technology and regulatory compliance audits of business and support areas to assess the effectiveness of the organization's internal controls. Internal Audit performs ongoing reviews of the organization's internal controls based upon input from the enterprise risk assessment results, industry considerations or new regulations, coverage of external audits (SOC 1, SOC 2, compliance reports, SOX), information security and compliance groups and Internal Audit's knowledge of the control environment. Audit methodology is based upon the Institute of Internal Auditors (IIA) standards. Internal Audit reports are directed to senior management, and issues identified are monitored through resolution. Internal Audit results are considered proprietary, and significant findings and the status of corrective actions are communicated to the Audit Committee.

Ethics and Reporting

Integrity and Ethical Values

Our leadership team believes an environment that demands integrity and honesty is critical to building and maintaining an effectively controlled organization. Similarly, the effectiveness of internal controls is rooted in the integrity and ethical values of the people who create, execute and monitor them. SS&C has programs and policies designed to promote and ensure integrity and ethical values throughout the organization. These policies are published, accessible to employees and enforced. Periodically, management communicates the importance of these policies and ethics standards to all employees and new hires, and annual training is required.

Code of Business Conduct and Ethics

Upon hire and annually, SS&C employees are required to complete training and attest to SS&C's Annual Certification of Code of Business Conduct & Securities Policy. SS&C's Code of Business Conduct provides employees with guidance and resources for confronting ethical issues in the conduct of their business responsibilities. The standards contained in this policy cover various topics including compliance with laws, rules and regulations; conflicts of interest; anti-bribery, anti-corruption, anti-competition; insider trading; confidentiality; obligations to former employers; data security and privacy; honest and ethical conduct and fair dealing; protection and proper use of corporate assets; gifts and gratuities; accuracy of books and records and public reports; concerns regarding accounting or auditing matters; dealings with independent auditors; diversity, equity and inclusion; and workplace health and safety.

Employees are required to acknowledge they have read and understand the Code of Business Conduct and Ethics and will act in accordance with the Code of Business Conduct and Ethics as a condition of employment. SS&C's Chief Financial Officer and General Counsel are responsible for overseeing the Code of Business Conduct and Ethics policy. The Code of Business Conduct and Ethics is available on the SS&C [website](#).

SS&C adopted a Foreign Corrupt Practices Act Policy, a supplement to our Code of Business Conduct and Ethics that emphasizes and clarifies aspects of the Code that have particular relevance to issues arising under the U.S. Foreign Corrupt Practices Act (FCPA). The policy is available [here](#). FCPA is an anti-bribery and record-keeping statute that applies to SS&C and our officers and employees worldwide. The policy covers improper or questionable payments regarding:

- Payments to government officials or customer and supplier employees
- Cash and third-country payments
- Consultants, agents, and representatives
- Business entertainment, gifts and travel expenses
- Books and records
- Compliance



Monitoring Controls

Management and supervisory personnel monitor the quality of internal controls as a regular part of business activities. Exceptions to everyday activities are discussed with the appropriate levels of management and/or those charged with governance where appropriate.

Controls Related to Personnel

SS&C has policies and procedures for recruiting employees, evaluating job performance, remedial action for sub-standard performance or failure to adhere to guidelines and employee conduct.

SS&C Confidential and Anonymous Financial Concern Hotline

SS&C provides a facility for the reporting, investigation and resolution of complaints received regarding accounting, internal accounting controls or auditing matters. Understanding and acting upon any issues that exist regarding financial, accounting and/or audit matters is an essential component of SS&C's ability to take action and ensure the highest levels of financial fidelity. SS&C policy requires concerned individuals to send an email, submit a web form or leave a voicemail in accordance with instructions on the SS&C [website](#).

SS&C's Chief Financial Officer and General Counsel monitor the whistleblower hotline, and all messages are investigated. SS&C internal audit verifies that such investigations were conducted.

Independent External Audits

SS&C's financial statements are audited by a nationally recognized independent accounting firm where an opinion is formed as to such financial statements and SS&C's internal controls over financial reporting. SS&C also maintains SOC 1 and SOC 2 audits and numerous ISO Certifications performed by internationally recognized independent accounting and certification firms. The SS&C Private Cloud, which hosts a large number of SS&C applications, maintains SOC 1 and SOC 2 audits and operates out of ISO 27001 certified data centers. These audits and certifications demonstrate SS&C's commitment to maintaining effective controls.

Supplier Requirements

SS&C holds our suppliers to the highest standards. We have a rigorous evaluation and oversight process; this includes meeting and adhering to contractual requirements.





Customer Engagement

Customer-Centric Team Approach

Our clients have a dedicated core team with deep domain expertise in the industries we service. Our client service teams represent experienced professionals familiar with our clients’ business needs and service requirements, as well as SS&C’s full suite of offerings to ensure we can support our clients’ changing requirements. Our client service teams report up into the business units supporting key market segments such as wealth and traditional asset management, alternatives, insurance, banking, retirement and health solutions. The benefits of our client service teams and relationship management approach are:

- Senior-level support and relationship management leadership
- Single point of contact for clients’ service and technology needs and issues
- Direct accountability for meeting and exceeding all mutually agreed to service performance expectations

- Immediate knowledge and familiarity with the client’s preferred way of doing business and internal processes
- Sharing and exchange of knowledge and resources with other client services teams; access to best practices
- Customized communication and reporting plans, including the frequency of calls, reports, strategic reviews, and product updates

Customer Engagement

Clients have senior-level employees, directors and managing directors accountable for the relationship’s strategy, supervision, escalation and resource allocation. Our workforce is predominantly full-time employees, and we use limited contractors or third parties to ensure we can provide the highest possible level of service to our clients. The account team completes a quarterly service review with each client where the client’s strategic initiatives are discussed. This enables SS&C to prepare for changes and initiatives at our clients’ organizations and evolve our service delivery model to adapt to our clients’ changing requirements. Clients are kept current on key matters such as regulatory changes, technology investments and new service offerings at SS&C.

Client Monitoring Program and Satisfaction Measures

SS&C’s Client Monitoring Program (CMP) features a senior executive (sponsor) who is assigned to regularly consult with each client in addition to the client’s dedicated service team. The CMP sponsor is independent of the service teams and reports all action items from these meetings on a proprietary client monitoring system where they are tracked to closure. As a representation of client satisfaction, SS&C’s revenue retention rate has historically ranged from 95% to 96%.



In 2022, revenue retention rate was

96.3%

and LTM Q2 2023

96.5%

Developing ESG Focused Products and Services

ESG investing is one of the most talked-about subjects in the industries we serve. Asset Managers have to deal with investor questions, new regulations, national and international studies and reports, market research and an accompanying explosion in ESG data. Trying to stay on top of all of this can be a daunting prospect. Given the increased level of public concern, the introduction of financial market regulations was inevitable. The Sustainable Financial Disclosure Requirement (SFDR) requires all financial market participants in that market in the European Union (EU) to comply with periodic reporting including adherence to mandatory ESG indicators. These include greenhouse gas (GHG) emissions, biodiversity, water, waste, and social and employee matters, and reporting commences in 2023. The SEC and FCA are in the final stages of completing their respective directives for ESG reporting.

SS&C has built an ESG solution to help managers with their ESG monitoring, reporting and regulatory compliance. We have partnered with leading data vendors and significant institutional investors to create ESG transparency reports enabling clients to keep investors informed of ESG risk exposures.

Our solutions include:

- Reporting on commonly reported ESG risk metrics
- Product involvement report showing fund/portfolio exposure to both “positive” and “negative” ESG focus areas
- Carbon reporting solution focuses on visibility of the fund/portfolio’s exposure to carbon and climate-related indicators and risks

These solutions ensure clients can keep investors informed of ESG risk exposures if the manager chooses to show that to their investors.

We also offer educational solutions through the SS&C Learning Institute. Our ESG investing course is available to associates and clients. This course introduces ESG factors as a topic area for the financial services industry. While the term ESG has been used by investors and lenders as they do their analysis before making investment decisions, it has taken on a broader meaning. To many, the term ESG now represents the ways in which businesses and those who invest in them are thinking about the longer-term sustainability of their firms, industries and capitalism itself. This course explores these themes, provides learners with a basic understanding of core ESG concepts, discusses ongoing debates in the field and is available for various industry CE credits.



The learning objectives focus on:

-
Developing a conceptual understanding of ESG factors as externalities
.....
-
Recognizing common terms linked to sustainability and investing
.....
-
Exploring the magnitude and timing of the shift towards ESG investing
.....
-
Examining the evolution of ESG as a concept in the financial services industry
.....
-
Recognizing the principal sustainability accounting standard setters
.....

Data Privacy and Cybersecurity

Information Security

SS&C recognizes information is a critical business asset and SS&C's ability to operate effectively in a market with legislative and regulatory requirements can impact how we handle business information.

In conducting our business activities, SS&C is entrusted with confidential information from our clients, business partners and employees. Confidential information may include sensitive business and technical knowledge as well as private personal information. As a data processor, SS&C only uses data from clients to provide contractually agreed-upon services. SS&C is committed to information security and implemented an Information Security Management System (ISMS) modeled on ISO/IEC27002 Code of Practice for Information Security Management.

The ISMS is operated by the Global Information Security team headed by a Global Chief Information Security Officer (CISO). The Global CISO provides periodic updates to management and SS&C Board of Directors.

Access to client information is restricted based on need-to-know and need-to-perform tasks. We maintain an information security program including internal policies addressing the acceptable use and access to confidential business information and personal information, which may be contained within SS&C's information systems. We maintain physical, electronic and procedural safeguards designed to guard personal information from loss, misuse or unauthorized access, disclosure, alteration or destruction of the information that is provided to us. SS&C prepares for security incidents and data breaches by analyzing threat intelligence feeds to prepare for potential incidents, by holding periodic cyber incident tabletop exercises, and by reviewing lessons learned on a regular basis.

SS&C is committed to providing quality secured services through:

.....
Strict information security compliance audited by third parties with SOC reports and ISO certifications
.....

Adherence to SS&C policies and procedures including an incident response plan, acceptable use and privacy policies
.....

Ongoing enhancements to security tools and practices
.....

Compliance with applicable laws and regulations
.....

Availability of services during identified business contingencies
.....

Annual and ongoing security awareness and training that covers acceptable use of assets, phishing and email security
.....

Data Protection

SS&C is committed to protecting personal data and respecting individual privacy. We adhere to local and international laws related to data protection and privacy, including but not limited to:

- UK and EU General Data Protection Regulation (GDPR)
- Canadian Personal Information Protection and Electronic Documents Act (PIPEDA)
- California Consumer Privacy Act of 2018 (CCPA) as amended by the California Privacy Rights Act of 2020 (CPRA) effective January 1, 2023
- New consumer privacy laws in Colorado, Connecticut, Utah, and Virginia

While continuing to track data protection developments, SS&C has implemented and adopted GDPR as our global data protection standards and our privacy compliance plan incorporates relevant policies, processes and data mapping activities to meet requirements. SS&C has appointed a Group Data Protection Officer.

As part of our annual global security and privacy awareness training, SS&C has an established mandatory employee GDPR training program in place for new hires and data protection for all staff. SS&C is required under local law and regulations to maintain certain records in accordance with these local laws and regulations. Our relevant policies facilitate the different retention periods that different business lines and applicable laws would require. You can read our full privacy policy [here](#).

Third-party services are limited. Examples are pricing vendors, data center facilities and offsite backup tape storage vendors. SS&C has assessed that our third-party services providers are reputable organizations that meet GDPR compliance standards and required contractual commitments.

For any personal data that is shared within and between entities that are part of the SS&C group of companies, such data transfers are guided by the SS&C data transfer agreement pursuant to EU standard contractual clauses deemed equivalent in the Cayman Islands for the purpose of DPA or PIPA and acknowledged in other countries to include the United Kingdom and Switzerland.

The SS&C privacy policy is available on our [website](#).



PEOPLE & CULTURE

Employee Attraction and Retention

Learning and Development

Diversity and Inclusion



Employee Attraction and Retention

Overall Hiring Practices and Philosophy

As a global organization, we view diversity as one of our biggest strengths and advantages. At SS&C, employees represent widely diverse cultural backgrounds and professional and personal experiences. We value individualism and distinct viewpoints. We believe we can all learn something from each other and are committed to being an organization that welcomes, celebrates and thrives on diversity. For additional information on our approach to diversity, equity and inclusion, please refer to [page 23](#).

Our talent acquisition team is utilized by the business to support SS&C's dynamic staffing requirements. A talent acquisition partner sources, interviews and hires new employees while factoring in the long-term goals of our organization. The talent acquisition group works with the business to plan long-term recruitment strategies and maintain a world-class team.

Total Rewards

SS&C offers a comprehensive total rewards package to all employees and continues to look at the marketplace for ways to enhance our total compensation offering. Compensation comprises a combination of base salary, bonus and a variety of equity offerings. We offer annual merit increases based on company, departmental and individual success.

Our benefits package includes health care coverage, retirement benefits, life and disability insurance, wellness and employee assistance programs, flexible leave policies, tuition/professional reimbursement programs, matching gifts and more. Employee development is supported through continuing education and professional development programs.

With the impact of the pandemic and economic challenges over the last several years, we implemented a few initiatives to support how our employees work and live. For example, through the end of 2022, we chose to absorb the annual

increase in insurance premiums, ensuring our employees did not incur additional costs while maintaining the value of the benefits offered. We introduced a global hybrid work model. This new work model enables our employees' flexibility with balancing work and home life, as well as providing opportunities for collaborating in person for projects, workshops, onboarding events, and meetings with staff, customers and prospects. We believe in offering our employees maximum flexibility. To balance these objectives, the hybrid approach allows employees to determine where and how they will work combined with a target of four to six days in the office each month. Office hoteling options provide employees flexibility to choose dates and an SS&C work location.

Compensation

SS&C provides a competitive, comprehensive package designed to attract, retain and motivate a talented, highly skilled and performance-driven workforce. We recognize and reward high performance and desirable behaviors through annual salary reviews, promotions, variable pay such as discretionary cash bonuses or commission plans, and equity. Our compensation program supports the business's growth strategy by emphasizing the importance of pay for

performance in meeting and exceeding corporate and individual goals. Our broad-based stock options reinforce this growth strategy by aligning employees' goals with the long-term interests of our shareholders through appreciation of the stock price over a vesting period.

SS&C offers a discretionary annual merit increase and a discretionary bonus program. For our bonus eligible employees, the discretionary bonus is awarded three times per year. SS&C also offers an equity program. Most recently:



74%
of employees
received bonuses

70%
of employees
received equity awards

Matching Gifts

SS&C offers a matching gifts program for all US employees. Through our matching gifts program, we provide a positive impact to the quality of life of those around us strategically and sustainably. The matching gift program supports associates' monetary contributions to their favorite tax-exempt entities by providing a dollar-for-dollar matching gift up to \$10,000. Our matching gift program provides an outlet for employee philanthropic passions and inspires opportunities corporately and individually to give back to others and bring our company values to life.

Health and Wellness

With over 27,000 employees, SS&C recognizes the importance of supporting the health and wellness of our employees both physically and mentally beyond our traditional health benefits. We strive to improve the overall well-being of our global employees through a variety of programs, including online health assessments, healthy pregnancy/healthy babies incentive programs, awareness programs focusing on health issues such as diabetes and hypertension, stress management, mental health workshops for managers, gym memberships and yoga. Another benefit we provide is the Bright Horizons program. This program includes tuition

discounts at participating childcare centers, resources to find sitters, nannies, pet sitters, housekeepers and senior care solutions. The US-based program is available to all benefit-eligible employees and spouses (including domestic partners) who are enrolled in one of the SS&C medical plans.

Our goal of providing evolving health and wellness programs is to cultivate healthy habits resulting in our employees' overall health and well-being and ensure everyone feels supported both personally and professionally. SS&C's global health and wellness program includes mindfulness training and online exercise classes.

SS&C offers a Global Employee Assistance Program (EAP) through Lifeworks, providing comprehensive EAP services/resources 24/7, 365 days a year to SS&C employees and eligible family members worldwide. The program includes:

- Short-term and solution-focused counseling
- Support and research services relating to childcare, maternity and eldercare
- Consultation for legal concerns such as family law, tenant/landlord issues, real estate, etc.
- Support and consultation for financial concerns such as budgeting, debt/credit management, estate planning, etc.

SS&C is committed to promoting a global benefits philosophy in order to provide a safe and healthy working environment. We provide employees access to professionally managed quality benefit programs to support them and their families with a focus on providing security, motivation and retention that varies by region and cultural norms in each country we do business. Our benefits are competitive with the marketplace, which helps attract employees, and are cost efficient for both employees and SS&C.



Emerging Professionals Program

SS&C is dedicated to attracting, retaining and cultivating the next generation of talent. Our interns and new graduates do meaningful work on real projects that affect how our business runs, allowing them to contribute to our company's future and the global community.

Our organization supports interns, apprentices and co-ops, providing hands-on opportunity for pending graduates to acquire real-world experience while showcasing their skills throughout the organization. The most qualified have the chance to join our company full-time after successful completion of their studies.

Mentorships and Global Mobility

The Succession/Mentorship program is a global initiative to nurture talent and prepare people for taking future leadership roles. Our leaders spend quality time and provide 1:1 coaching to potential future leaders. It is helping our employees to learn from the experience of senior leaders and they are getting ready for future bigger roles. For our organization, this platform is providing pipelines of readily available resources to fill gaps or roles in the future.

As the world is getting more and more integrated, we have started taking advantage of available talent in any geography and moving them to suitable roles available in other parts of the world. This way, we are able to retain our top performers and fill gaps wherever we are having challenges in finding the right talent. This is helping us in extending our support to our customers without compromising on quality.

Global Employee Referral Program

SS&C welcomes employee referrals as an integral part of our Talent Acquisition process and SS&C's overall success. We believe who better to know the complexity of our work than those currently performing it every day. SS&C's employee referral bonus program is designed to encourage employees to refer qualified candidates to support our global hiring needs.



Learning and Development

Our ability to attract, develop, deploy and retain the best global talent is critical to maintaining our customer-centered reputation in the health and wealth industries. As more individuals choose to work for organizations that align with their values, we at SS&C believe it is our purpose to empower employees to grow their skills, gain perspectives and create impact at work and in their communities.

While training and career development play a vital role in an organization that aims at progressing, SS&C's Learning and Development (L&D) initiatives go far beyond imparting essential job skills. Our initiatives provide financial support for continuing education, opportunities for employees to enhance critical job skills, professional development resources on a wide range of topics, and leadership development programs based on experience.

Investing in Our Most Valuable Asset: Our People

In 2022, we invested approximately \$5 million globally in employee training and development. Our dedicated Learning and Development team offers training courses on financial markets, professional development, application and technical training through computer-based learning, and virtual and in-person training. Using internal resources, our workforce spent an average of 12 hours per person learning.



In 2022, invested

\$5M

in training and development

SS&C Learning Institute offers over 2,400 classroom courses; 1,400 online courses, 160 microlearning resources and 80 video courses. Over 250 industry education courses available for CE credits.

Enhancing our Workforce Through Technology Training

Technology is our strength, and we want our employees to stay ahead of the technology learning curve. SS&C has partnered with two of the most robust service providers in technology training – O'Reilly Learning and United Training – to provide our employees with access to the industry's best technical training and certifications. We continuously upgrade our products and widen our service offerings; technology training is a step towards making these goals a reality.

Gaining an Edge on Learning Through Our In-House Learning Platform

The SS&C Learning Institute platform is our proprietary learning management system (LMS) for the administration, tracking, reporting, automation and delivery of education and training programs. The SS&C Learning Institute provides access to both SS&C Learning and Development content and the GAMMA library of online courses and tests offering CE credits. With over 4,000 learning

programs on a range of topics – from financial markets to professional development and technical training – it has something for anyone wanting to learn and grow. Our employees can choose among online courses and tests, videos and articles, as well as instructor-led training courses.

All SS&C's employees, representing over 27,000 individuals, have access to SS&C Learning Institute to complete mandatory training initiatives and other assigned courses.



97%

of all courses are rated excellent or above average

Building our Leadership Pipeline Through the Top Talent Program

People development is essential to delivering our strategy; therefore, the quality of talent across SS&C is fundamental to the business's future growth and success. Our top talent program identifies and then enables our high-potential associates in their growth and development.

The top talent program is a yearly program for individuals recognized as the top two percent performers within their division and 2023's program will have approximately 600 participants. Top talent consistently and significantly outperforms their peer groups in a variety of settings and circumstances. While achieving superior performance levels, they exhibit behaviors that reflect our company's culture and values in an exemplary manner. Moreover, they show a strong capacity to grow and succeed throughout their careers within the organization.

Enrolled participants have access to a mentor they meet with regularly, either in person or virtually. Mentor meetings allow participants to have individualized career coaching from senior management at the firm. Participants are invited to several initiatives throughout the year to gain

more exposure, network, meet with top leaders, gain knowledge on SS&C and much more. Involvement in the program allows participants to celebrate their success and cultivate team building and leadership skills. The satisfaction rating is 95% from participants involved in mentoring, coaching, networking and other program initiatives.

Developing Our Leaders at Every Level Through our Leadership Development Initiatives

An excellent way for our managers at all levels to improve their capabilities, inspire their teams, and achieve outstanding business results is through leadership skills training. Successful leaders can transform organizations, enhance value creation, create efficiencies and engage their employees to deliver better results. SS&C offers a three-tier leadership development program:

- 1 **License to Lead**
For new managers

- 2 **Developing Your Leadership**
For middle management

- 3 **Outstanding Leaders**
For senior leadership

These programs provide guidance and training on effectively leading employees and projects. Yearly, approximately 1,000 employees take part in these three programs and 94% of all respondents ranked the programs above average.

Continuous Learning and Learning Paths

The development of our employees is a strategic priority. We foster a learning culture that supports the development of our employees' key capabilities. We believe this will help them succeed in their current roles and provide a platform for meaningful, long-term careers with SS&C. All employees at SS&C receive new hire training and yearly mandatory training.

Our updated learning paths have been designed to support our employees at every stage of their careers and support the business by developing talent with valuable and modern skills. SS&C currently has 74 learning paths and a professional development path. This provides employees a path to success by including financial, technical, application and professional development offerings.



Leadership training rated above average by

94%

of participants

Engaging our Employees Through Our Learning Needs Survey

In early 2022, we conducted an organization-wide training needs survey to listen to our employees' voices sharing their training needs and wants. With almost 3500 responses, the survey provides meaningful input shaping our L&D offerings in 2023 and beyond. Results are shared with management, learning and development professionals across SS&C, and available for all employees to view on our Intranet. Areas with significant feedback are addressed by communicating course availability, creating new courses or working with other teams to resolve gaps.

Diversity and Inclusion

Strategy

SS&C believes the diversity of experiences and backgrounds of its employees, officers and directors are important to its success, and fosters an environment where such diversity is encouraged.

Developing a comprehensive strategy for Diversity and Inclusion (D&I) in a large global organization requires a thoughtful and systematic approach.

As such, we have defined three key areas of focus:

- Recruitment and retention
- Inclusive leadership
- Employee engagement

These areas are underpinned by a set of objectives for focus of activity over upcoming years:

- **Talent acquisition and retention:** Review recruitment processes to attract diverse talent. Explore partnerships with organizations that specialize in diversity recruitment.
- **Employee Resource Groups (ERGs):** Create opportunities for employees to engage with D&I initiatives actively. Encourage open dialogue across ERG groups to ensure cross-company collaboration.
- **Education and training:** Continue to offer existing training programs. Course examples include:
 1. Diversity, Equity & Inclusion at SS&C
 2. Diversity in Coaching
 3. Ethics in Coaching
 4. Mandatory Diversity Training – UK
 5. Inclusion in the Workplace
 6. Unconscious Bias
 7. United for Inclusion

At SS&C, D&I is about leveraging our global influence to drive positive change within our company, our customers and across the communities where we live and work. D&I is an ongoing journey, and it requires continuous effort, commitment and learning. SS&C recognizes our strategy will require constant review and adaptation to ensure it fits our organizations' and communities' unique needs.

Progress and Goals

Previously, D&I had been driven at a business subsidiary level with individual strategies being implemented with little cross-company collaboration. The goal for future years is to provide cohesion across the entire company, where all business groups can work together under a shared vision to drive best practices and inclusion globally.

Over the past 12 months, SS&C has taken a number of steps forward to build a more robust approach to D&I. Other than adopting a unified /uniform approach to D&I organization wide, we are also defining metrics and goals to track our continued progress. To enable the delivery of these steps, SS&C HR will lead this initiative with assistance from its dedicated D&I lead.





Employee Resource Groups

Employee Resource Groups (ERGs) at SS&C are voluntary, employee-led groups that bring together employees with shared characteristics, experiences or interests.

The purpose of ERGs at SS&C is to foster a sense of belonging, provide networking opportunities and support personal and professional development for their members. They are open to all employees who wish to contribute to the aims of the network within each business subsidiary. ERGs at SS&C recognize the intersectionality across multiple groups and collaborate with one another to promote and facilitate cross-ERG inclusion.

There are ERGs across multiple business subsidiaries representing groups such as:

Name	Focus
Asians at Eze	Race and/or Ethnicity
BlackIN	Race and/or Ethnicity
Black Employee Network	Race and/or Ethnicity
Hispanic/Latinx Organization for Leadership and Achievement	Race and/or Ethnicity
PRIDE	LGBTQ+
PrideIN	LGBTQ+
Parents	Parents and/or Careers
Seven	Veterans
The Network	Women
Women in Automation	Women

SS&C is striving to create an even more inclusive approach to ERGs, and in the future would like to create groups where all employees across all business units can join to drive even greater cross-company collaboration.

Some examples of the events ERGs at SS&C have celebrated are:

- Hanukkah celebrations in London Office
- Understanding Juneteenth Webinar
- Educational communications on Pride

Workforce Composition

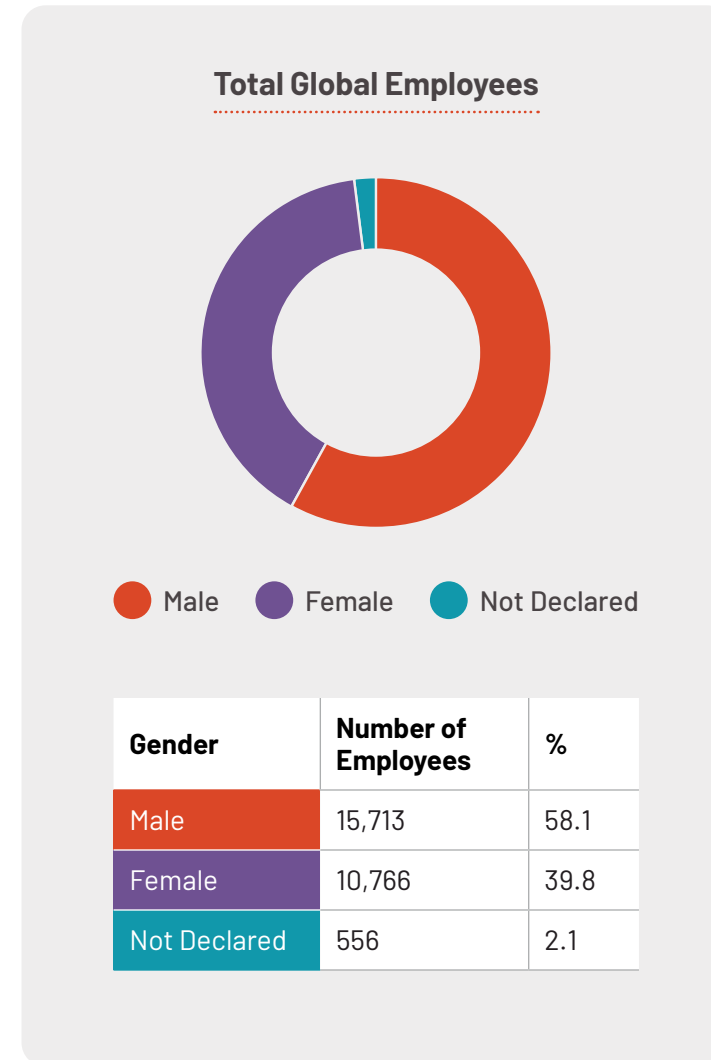
Workforce composition data is a crucial tool for organizations to track progress, identify areas for improvement and set D&I goals.

As part of our ongoing commitment to D&I, SS&C has started to examine the composition of our workforce by looking at the diversity of some groups within the business.

The following tables present information on employees who have provided self-identification as of July 2023. The information displayed on race/ethnicity of employees is categorized based on Equal Employment Opportunity (“EEO”) classifications and is presented for U.S. employees who self-identified.

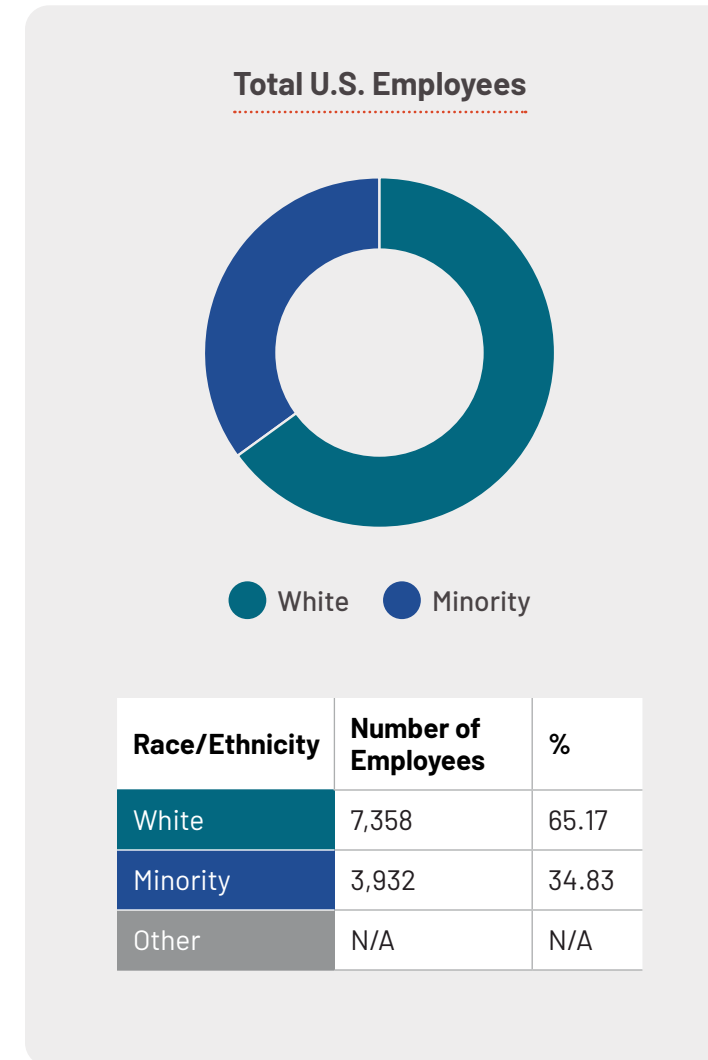
Gender Diversity

The following is a snapshot of the global gender data:



Race and Ethnicity Data – U.S.

Below is a snapshot of the race/ethnicity data for U.S. employees only.



Attracting and Retaining Diverse Talent

As a global organization, we view diversity as one of our biggest strengths and advantages. At SS&C, employees represent widely diverse cultural backgrounds and life experiences. We value individualism and distinct viewpoints. We believe we can all learn something from each other and are committed to being an organization that welcomes, celebrates and thrives on diversity.

As an equal opportunity employer that values a diverse and inclusive workplace, our recruitment strategies involve seeking top talent through a wide variety of sources including the Professional Diversity Network (PDN) and Direct Employers Association. We ensure we have a pipeline of candidates who possess the ever-evolving skills and experiences we seek for positions at all levels of the organization.

Policies and Procedures

SS&C is committed to maintaining a safe and secure work environment for all our employees that is free from all forms of harassment, discrimination and retaliation. We pursue our business objectives with integrity, trust and respect and operate in full compliance of all applicable laws and regulations. SS&C has an anti-harassment policy in place. In support of our commitment, we require all employees to complete a mandatory online workplace harassment compliance training course designed to increase awareness and knowledge of applicable laws in order to prevent sexual and all forms of harassment. This particular training is specific to employees in the US.

SS&C Technologies is a publicly traded firm, and all material litigation, claims and lawsuits are a matter of public record. The firm has not been subject to any material regulatory investigations or any disciplinary actions in the past five years. SS&C Technologies Holdings, Inc. includes in its publicly available financial statements, disclosure of its material litigation matters. Please see those filings for details on such matters available online [here](#).

We have a defined whistleblowing process available [here](#).



ENVIRONMENTAL AWARENESS



Climate and GHG Emissions

Energy Consumption and Data Centers



SS&C works to support environmentally responsible initiatives across its global locations that not only benefit local and regional resources but also those of our clients and their customers. We are mindful of our impact on the environment for both consumers and producers.

We recognize that environmental and climate change reporting is an important aspect of our overall ESG reporting and disclosure. Our recent ESG materiality assessment confirmed that our stakeholders view climate change as an area of priority, and we are committed to using our reporting channels to share our progress and path forward toward a comprehensive GHG inventory and climate risk assessment. We are also aware of and closely following the impending release of the SEC climate change rule, targeted to be finalized in fall 2023. We have dedicated resources to evaluate the requirements and expect to have more information in our next report.

We measure energy use for all our businesses. GHG emissions are tracked in select business units.

Climate and GHG Emissions

SS&C is committed to complying with regulatory reporting requirements within the operating jurisdictions in which we do business. Currently, we have taken action to reduce our carbon footprint in accordance with the 2018 Streamlined Energy and Carbon Reporting (SECR) regulations for certain of our UK businesses where we calculate and disclose GHG emissions data and efficiency measures.

The U.S. Security and Exchange Commission (SEC) has released a proposal to require standardized GHG emissions disclosures in line with existing recommendations from the Task Force on Climate-related Financial Disclosures (TCFD).

We have recently undertaken additional internal efforts to expand the scope of identifying and collecting global GHG emissions data in preparation of an anticipated SEC final ruling.

We are committed to disclosing GHG emissions data to our stakeholders as the data is available.



Energy Consumption and Data Centers

At SS&C, we have identified three ways to significantly decrease our energy consumption:

- Maintaining and improving core systems at the data centers for efficiency (generators, UPS batteries, cooling towers, etc.)
- Increasing fine-scale monitoring of power consumption down to the rack and host levels, which enables us to identify power distribution and efficiency problems in near-real time
- Our global private cloud pods (where we deploy newer servers) are more efficient than existing legacy gear

Power Usage Efficiencies are realized when investments are made in highly efficient equipment and deployed within data centers paralleled with new technology. Areas of investment in operations include generators, HVAC/chiller systems and power.

- Recent investments by the business, into high-efficiency UPS Systems in Winchester, have scaled electrical systems to a high level of resiliency. Upgrades to the UPS System capacity enabled initial expansion of Cloud Technology into Winchester. The third and final installment of UPS Systems is planned for Q1 of 2024.
- Replaced towers in the Yorktown Data Center, which will increase efficiencies in heat transfer of the data center. Aging systems lose efficiency in high-temperature/high-humidity situations. Improving approach deltas on cooling towers raises efficiency in the chilled water cooling system, allowing the system to transfer heat from the data center to outside, thereby performing better in higher temperature and higher humidity environments.
- Continue to replace UPS battery systems. This is an ongoing project across data centers. Aging UPS battery systems pose significant risk to data center loads. As they age, they diminish in their ability to support loads between an outage and return of power via utility, or generators. Replacement of aging battery systems is currently taking place to reduce risk.

Looking ahead, SS&C plans on adding new technology in cooling of cloud pod environments wherever possible. Cabinet power consumption increases as legacy equipment is converted into cloud. Cooling requirements are parallel to cloud density. SS&C is exploring the use of water cooling at the rack level. Using rack-door coil cooling allows heat to be restored to ambient temperatures inside data centers where legacy equipment resides. This type of cooling will not only cool existing cloud, but will protect legacy equipment from heat sources. SS&C is also exploring CPU cooling technology, which will drive efficiencies deeper toward source-cooling. SS&C continues to invest heavily in cloud technology, enabling us to further reduce our real estate footprint by consolidating and reducing data centers.





Environmental Initiatives in Facilities, Technology, Procurement and Transportation

Energy management systems, power conservation technologies, water conservation with “low flow” plumbing fixtures, elevator modernization and efficient lighting strategies help reduce overall electrical usage.

- Purchasing green office items and employing cleaning companies committed to green products, including the Green Seal standard
- Increased awareness also reduces energy usage, with staff habitually switching off PC monitors when away from their desks
- We are subsidizing to encourage alternative methods of commuting to reduce road congestion and its associated emissions

Corporate Recycling

Through our corporate recycling program, we continue to reduce the volume of trash sent to landfills. A robust recycling program is one of the most significant steps a company can take to reduce its environmental impact. SS&C’s Asset Disposal Policy facilitates the recycling or reuse of excess materials.

Renewable Food Supply

SS&C’s two community gardens in Kansas City donate their produce to area food pantries. The gardens produce thousands of pounds of fresh produce annually.

Eliminating Paper

We heavily invest in deploying software and automated solutions to reduce paper-based equivalents. Many of our offices have transitioned to paperless work areas, and we encourage our employees to limit their use of printed materials.

SS&C provides documentation delivery options to customers to help reduce paper consumption. Our e-Investor platform evidences one example of SS&C’s technological development of environmentally sustainable products. E-Investor transforms the capital activity process, allowing investors to digitally complete, execute and submit their transaction (i.e., subscription, redemption, transfer), including supporting documentation, in a wholly electronic format.

APPENDIX

SS&C Key ESG Metrics

Relevant SASB Metrics



SS&C Key ESG Metrics

Section	Metric	Figure	Page
Governance	Board members independence	6/7	7
Governance	Average board tenure	15 years	7
Governance	Meeting schedule	At least once per fiscal quarter	7
Governance	Executive pay metrics	50% Performance stock units 25% Restricted stock units 25% Stock options	8
Governance	Completion rate of mandatory annual risk training	98%	10
Customer Engagement	SS&C historic revenue retention rate	95 – 96%	13
Employee Attraction and Retention	Percentage of employees receiving bonuses	74%	18
Employee Attraction and Retention	Percentage of employees receiving equity awards	70%	18
L&D	Global investment in training and development	~ \$5 million	21
L&D	Average hours of learning per person	12 hours	21
L&D	Number of programs available through the Learning Institute	3,800	21
L&D	Employees with access to programs	27,000	21
L&D	Learning Institute courses rated excellent or above average	97%	21
L&D	Satisfaction rating from participants involved in mentoring, coaching, networking and other program initiatives.	95%	22
L&D	Participants in leadership development training	~1,000	22
L&D	Participants rating Leadership training rated above average	94%	22
L&D	Learning and professional development paths offered	74	22

As of 12/31/22

Relevant SASB Metrics

Topic	SASB Code	Metric	SS&C Metric
Data Privacy & Freedom of Expression	TC-SI-220a.1	Description of policies and practices relating to behavioral advertising and user privacy	“SS&C is committed to protecting personal data and respecting individual privacy. We adhere to local and international laws related to data protection and privacy” (Page 16)
	TC-SI-230a.2	Number of users whose information is used for secondary purposes	“SS&C only uses data from clients to provide contractually agreed-upon services” (Page 15)
	TC-SI-220a.3	Total amount of monetary losses as a result of legal proceedings associated with user privacy	Please refer to our most recent 10-K for any information related to this topic
	TC-SI-220a.4	(1) Number of law enforcement requests for user information, (2) number of users whose information was requested, (3) percentage resulting in disclosure	Please refer to our most recent 10-K for any information related to this topic
Data Security	TC-SI-230a.1	(1) Number of data breaches, (2) percentage involving personally identifiable information (PII), (3) number of users affected	Please refer to our most recent 10-K for any information related to this topic
	TC-SI-230a.2	Description of approach to identifying and addressing data security risks, including use of third-party cybersecurity standards	“While continuing to track data protection developments, SS&C has implemented and adopted GDPR as its global data protection standards and our privacy compliance plan incorporates relevant policies, processes and data mapping activities to meet requirements. SS&C has appointed a Group Data Protection Officer.” (Page 16)
Environmental Footprint of Hardware Infrastructure	TC-SI-130a.3	Discussion of the integration of environmental considerations into strategic planning for data center needs	“we are reducing energy through three avenues: 1) maintaining and improving core systems at the data centers for efficiency (generators, UPS batteries, cooling towers, etc.), 2) increasing fine-scale monitoring of power consumption down to the rack and host levels, which enables us to identify power distribution and efficiency problems in near-real time, and 3) our global private cloud pods (where we deploy newer servers) are more efficient than existing legacy gear.” (Page 29)

Topic	SASB Code	Metric	SS&C Metric
Recruiting & Managing a Global, Diverse & Skilled Workforce	TC-SI-330a.3	Percentage of gender and racial/ethnic group representation for (1) management, (2) technical staff and (3) all other employees	Please refer to the Diversity and Inclusion section
	TC-SI-330a.2	Employee engagement as a percentage	Please refer to the People & Culture section
Intellectual Property Protection & Competitive Behavior	TC-SI-520a.1	Total amount of monetary losses as a result of legal proceedings associated with anti-competitive behavior regulations	Please refer to our most recent 10-K for any information related to this topic
Managing Systemic Risks from Technology Disruptions	TC-SI-550a.1	Number of (1) performance issues and (2) service disruptions; (3) total customer downtime. Show technical protocol	Please refer Customer Engagement section referencing quarterly reporting and customer monitoring program
	TC-SI-550a.2	Description of business continuity risks related to disruptions of operations	“SS&C has a comprehensive, multifaceted risk management program designed to identify, assess, mitigate and manage risk. SS&C’s risk management program consists of activities at the enterprise level to provide the overarching risk reporting and management framework and risk assessment, monitoring and management for enterprise-wide functions and risk.” (Page 10)



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